

Microsoft Outlook 2003 Handout

Table of Contents

I. MICROSOFT OUTLOOK 2003 EMAIL	1
A. Opening Microsoft Outlook	1
B. Customizing the Viewing Screen	1
C. Email in Outlook	3
1. Opening your email.....	3
2. Opening your email attachment	3
3. Creating a new email	4
4. Adding an attachment.....	5
D. Organizing Your Email.....	6
1. Creating a New Subfolder Under the Inbox.....	6
2. Other folder options	7
E. Other Email Options	8
1. Signature – Create, Add, or Remove	8
2. Contacts and Distribution Lists	10
3. Out of the Office Assistant	12

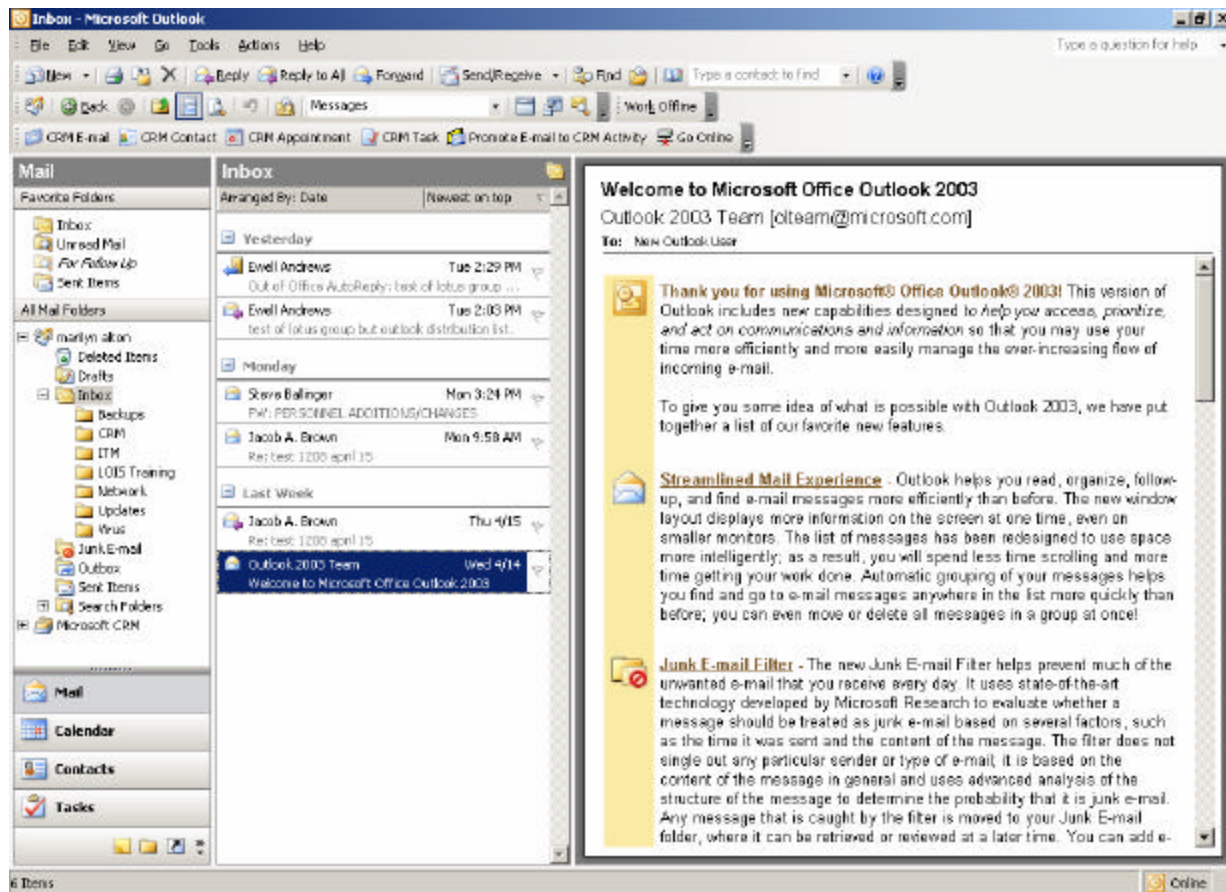
I. MICROSOFT OUTLOOK 2003 EMAIL

Microsoft Outlook has several functions. It is your email service, it provides the ability to create and use personal contacts, and it allows you to reference personal and shared calendars.

A. OPENING MICROSOFT OUTLOOK

1. Double-click on the Microsoft Outlook icon on your desktop. 

On the next page is an example of the Microsoft Outlook welcome screen which can be customized.



B. CUSTOMIZING THE VIEWING SCREEN

There are three sections on the Microsoft Outlook screen: Mail, Inbox, and Document viewer. This view can be customized.

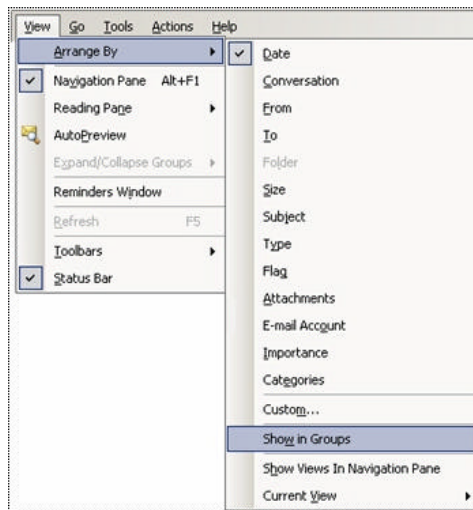
1. Navigation Pane

The left most section of the view above is called the Navigation Pane. It allows you to go quickly to email folders, mail, calendars, contacts, or tasks. When you click on an option in the Navigation Pane, the view in the pane to the right reflects this change.

2. Inbox

The default view of the Inbox entries is divided by days of the week and date. This can be changed by going to View, Arrange By, and unchecking Show in Groups. This will display the emails with the day, and date within the email instead of groups by day.

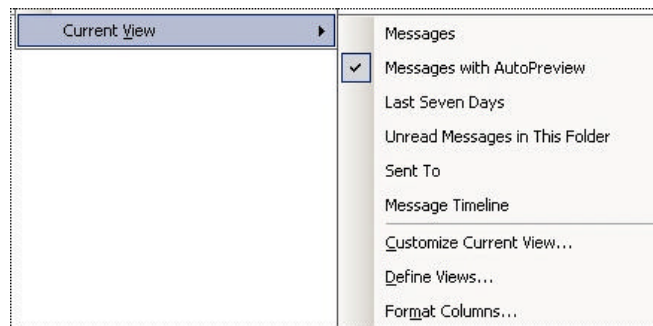
Below is an example of the options available in the View, Arrange By.



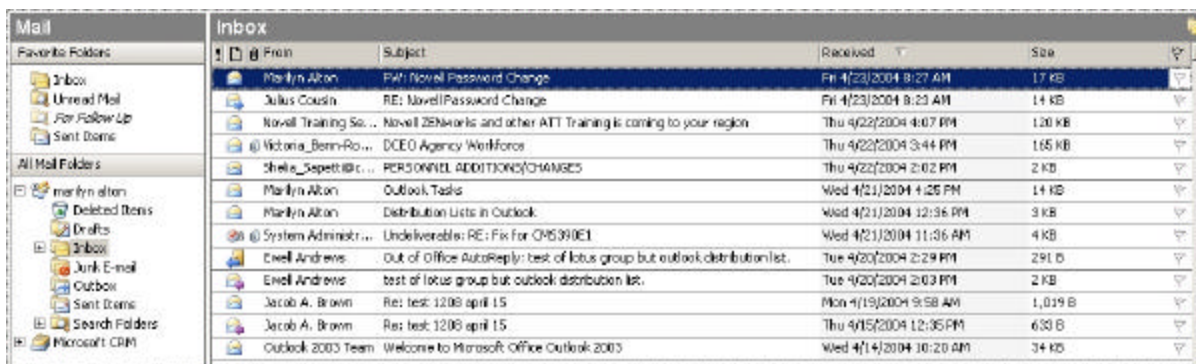
3. View screen

When an email is selected in the Inbox area, a preview of that document is shown in the View screen on the right. This allows you to view a document without having to double-click and open the email.

The Current View options shown below, allows you to customize or remove the view screen.



Below is an example of your messages with the options AutoPreview selected.



C. EMAIL IN OUTLOOK

1. Opening your email

The default for Outlook is to display a preview screen of emails you have received. To actually open the email, double-click on that email. Below is the email toolbar.

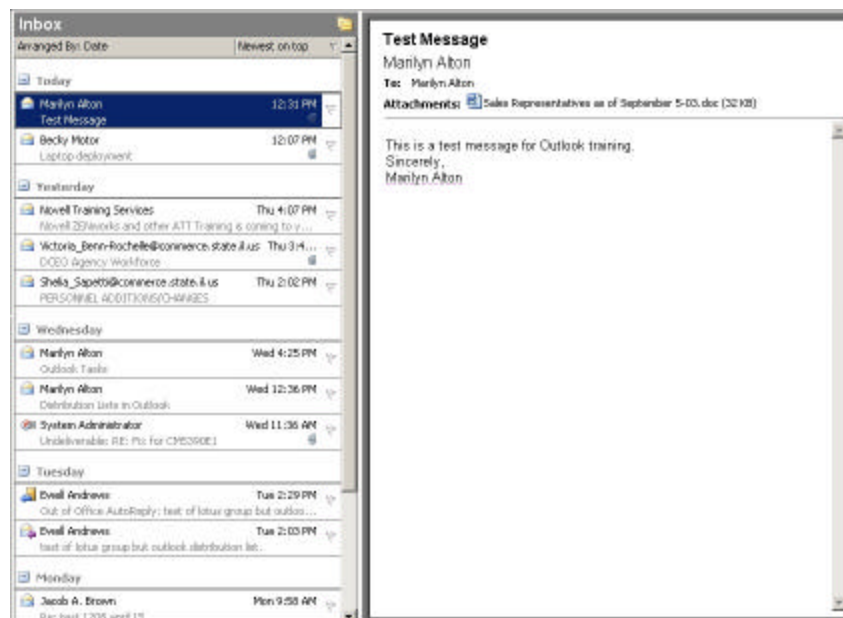


When you receive an email, you can Reply to the Sender, Reply to the Sender and All Recipients, Forward the email to someone else, Print the email, or Delete the email.

Do not use the Reply to All option if you receive an agency-wide email.

2. Opening your email attachment

On the next page is an example of an email that contains an attachment. Notice the attachment is listed below the subject line. In the Inbox view, there is a paperclip below the time of the email. This indicates there is an attachment. The view on the right displays the name and type of attachment being sent.



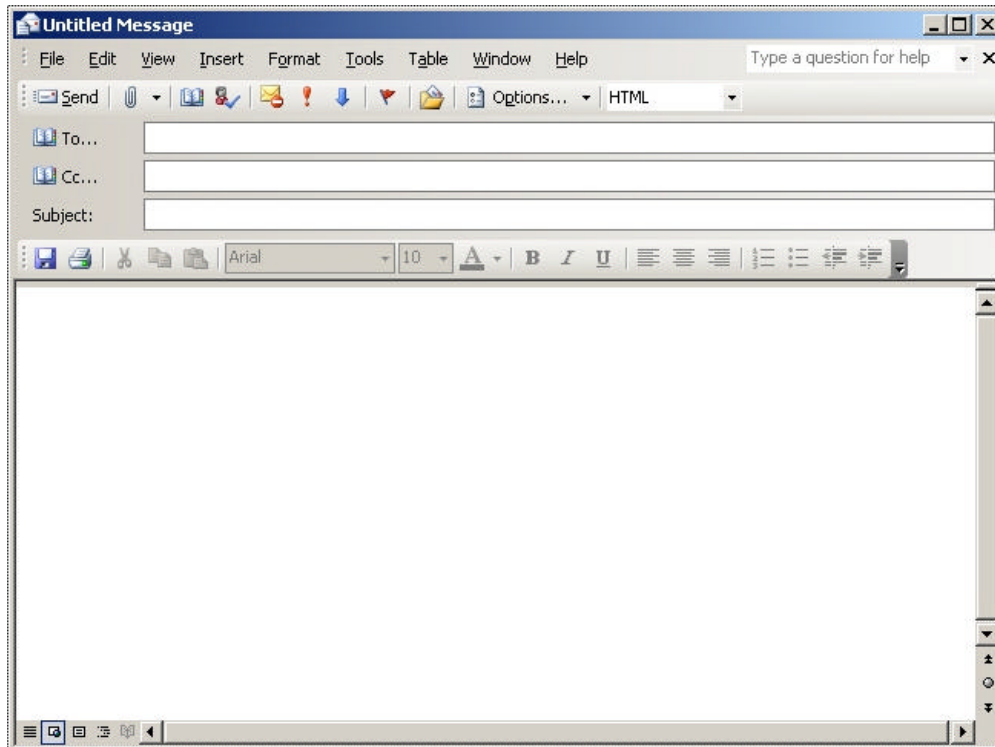
To work with this attachment, double-click on it in the right view pain. You will receive a dialog box which gives you the option to View or Save this document. If you select the View, the Outlook viewer will display the document. From this view, you can save the document.

If you need to revise this document and reply, use the Save option. Then open the attachment in the appropriate software. Make the changes, and save the document. Now you have a revised copy that can be sent as an attachment.

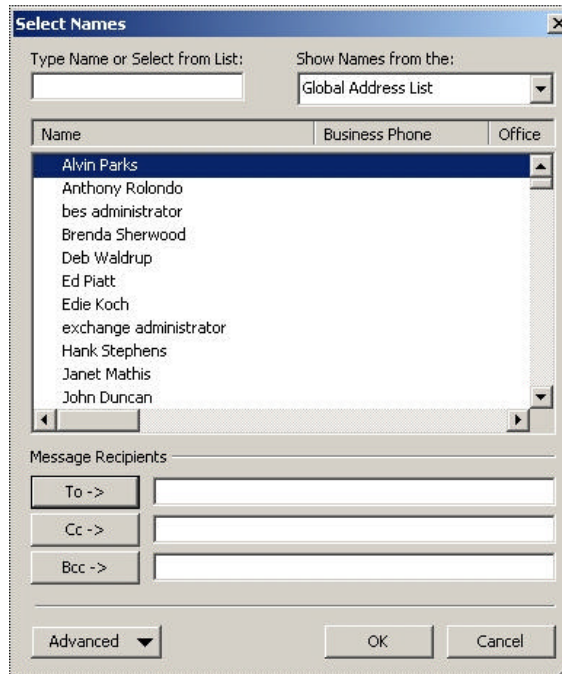
3. Creating a new email

On the Outlook toolbar is an icon – New. When this icon is activated, you have several options. The first option is to create a Mail Message. To the right of Mail Message, you will notice it has Ctrl+N. This is the keyboard shortcut for creating a new email.

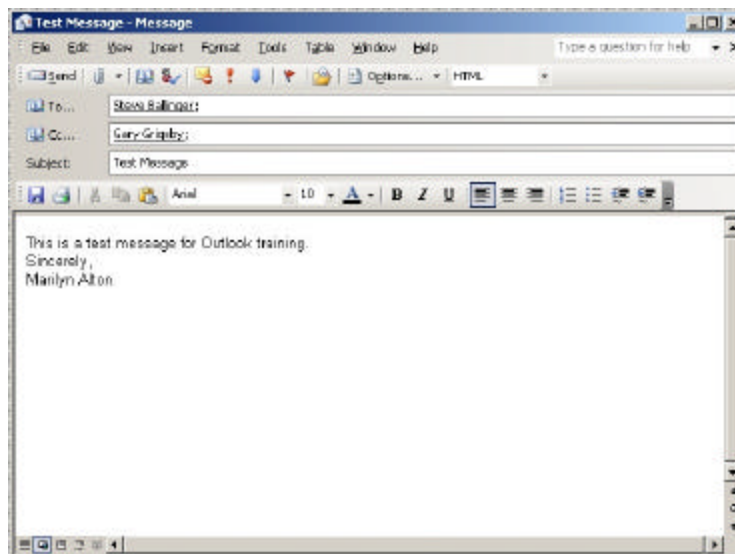
Below is a view of the new message screen.



When you left click on To... or Cc... the Global Address book below will appear. From this address book you can select State of Illinois employees. Once a name is highlighted, click on To, Cc, or Bcc to add the employee's name to the message recipients. When all names have been added, click on Ok to return to the email and complete your message.



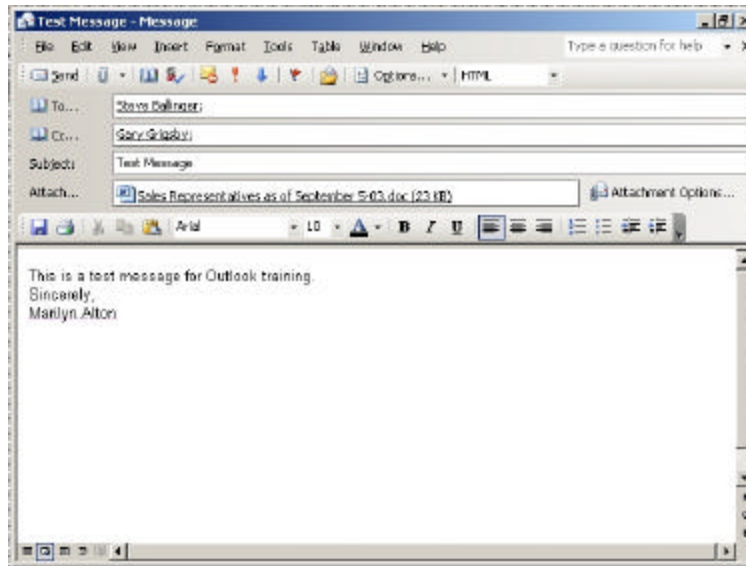
Below is an example of a completed email message.



4. Adding an attachment

Below the menu bar is an icon that looks like a paperclip. When you click on this icon, you can attach a document. Go to the location of the document. Highlight the document. Click on Insert. The attachment will be placed below the subject line. More than one attachment can be sent at a time. There is a size limit on the item being attached and sent. You will receive an error message if the attachment is too large for Outlook to handle.

Below is an example of an email with an attachment.



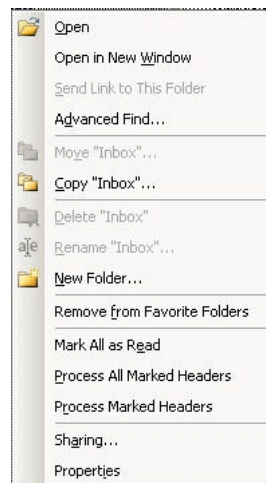
D. ORGANIZING YOUR EMAIL

1. Creating a New Subfolder Under the Inbox

To help organize your emails instead of having them all in a single list, you can create subfolders under your Inbox. These new folders can be used to organize your email by subject or sender.

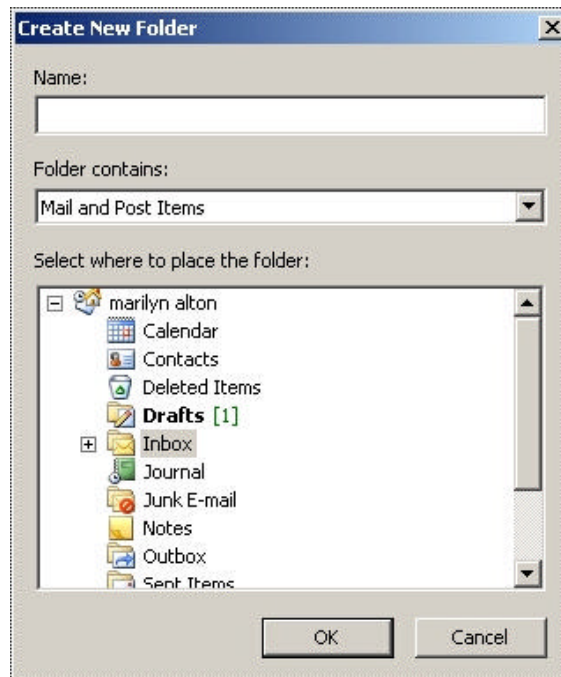
Below are the necessary steps.

- A. Right click on the Inbox folder in the Navigation Pane view.
The screen shown below will appear.



- B. Select New Folder...

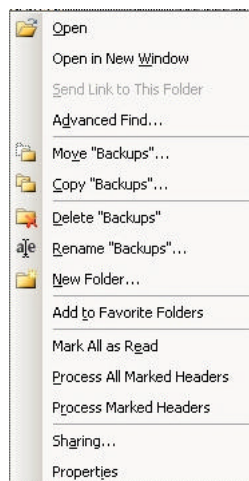
The screen shown below will appear.



- C. Type in a name for subfolder. The default location is under the Inbox folder. If you want to create a folder within a folder, expand the Inbox by clicking on the + sign to the left of Inbox. Highlight the subfolder, and click OK.
- D. Click on OK.

2. Other folder options

If you right click on an existing subfolder of the inbox, you will see a dialogue box. Among the available options are Move, Copy, Delete, Rename, or Create a folder.



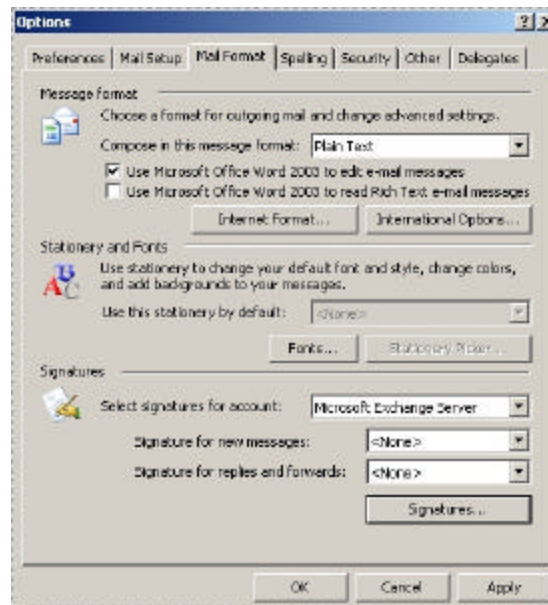
E. OTHER EMAIL OPTIONS

1. Signature – Create, Add, or Remove

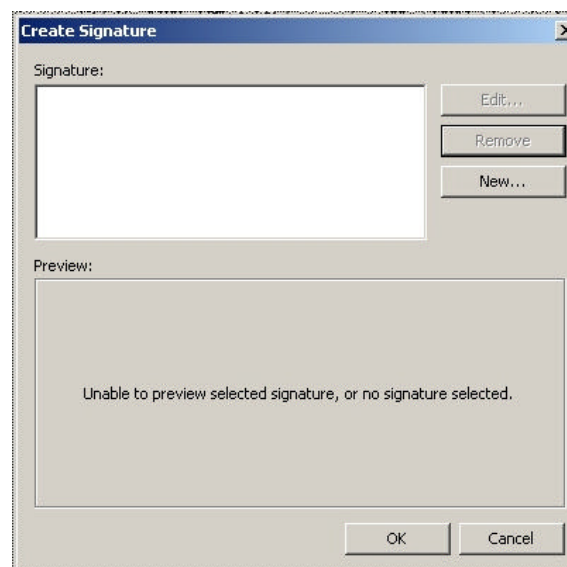
Within Outlook, you can create a signature which will automatically append to any email you send.

a. To create a signature for messages:

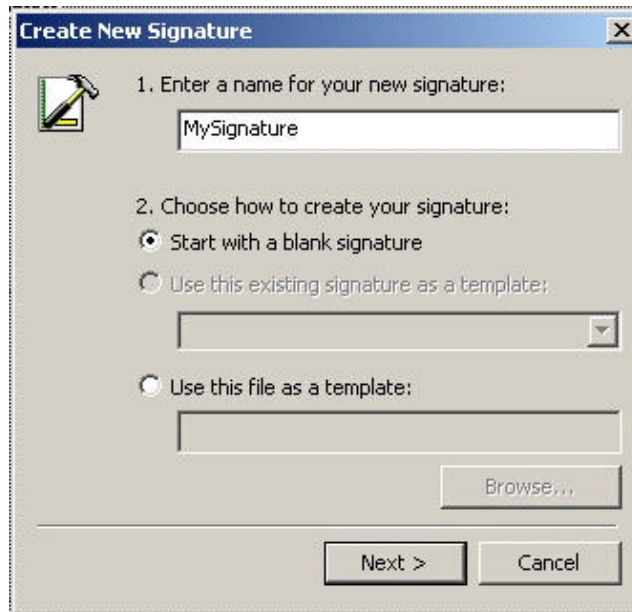
- From the main Microsoft Outlook window, on the **Tools** menu, click **Options**.
- Click the **Mail Format** tab.



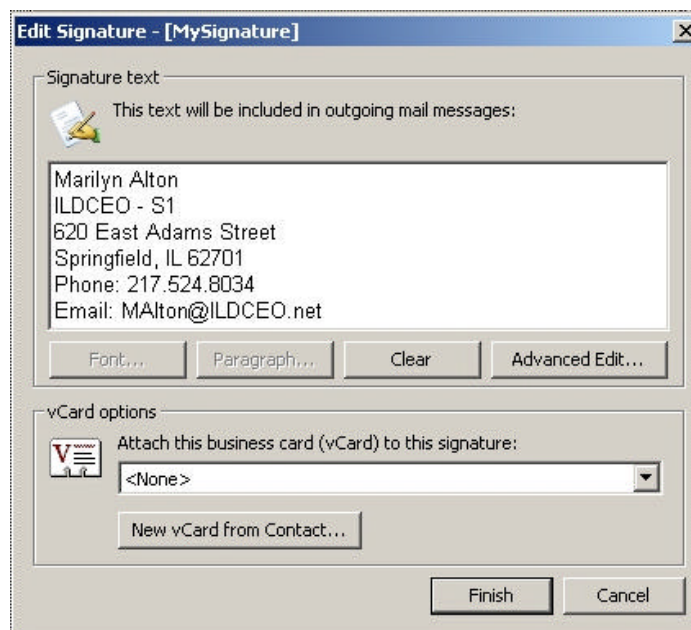
- In the **Compose in this message format** list, click the message format that you want to use the signature with.
- Under **Signature**, click **Signatures**.



- Click on **New**.
- In the **Enter a name for your new signature** box, enter a name.



- Under **Choose how to create your signature**, select the option you want. This is usually a blank signature.
- Click **Next**.
- In the **Signature text** box, type the text you want to include in the signature.



- Click on the **Finish** button. You will be returned to the original dialog box with your new signature displayed.

b. To edit a signature for messages:

- Use the steps listed above. After you click on **Signatures**, highlight the signature to be edited and click on **Edit**.
- Make the necessary changes to your signature.
- Click on **OK** until you are back to the Outlook Message Screen.

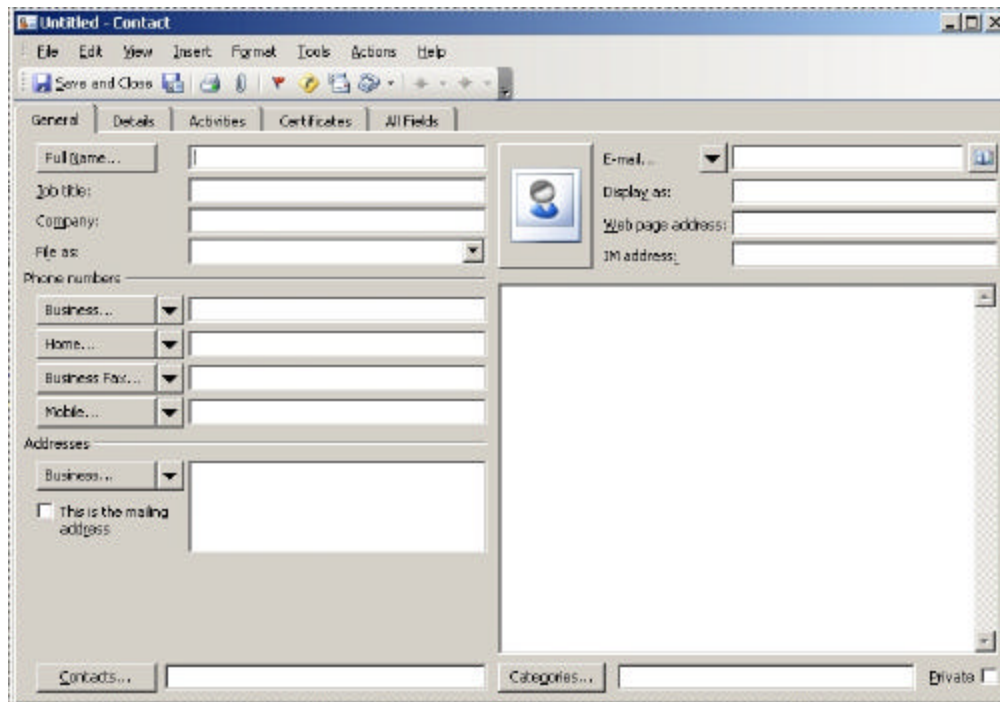
c. To delete a signature for messages:

- Use the steps listed above. After you click on **Signatures**, highlight the signature to be edited and click on **Remove**.
- Answer **Yes**. If there is not another available signature, the signature will revert to **None**.
- Click on **OK** until you are back to the Outlook Message Screen.

2. Contacts and Distribution Lists

Outlook has Global Addresses that are available to all users in the agency. At times, this is not enough. You need to be able to create your own contacts or distribution (group) lists. The following are the steps for setting up your own contacts.

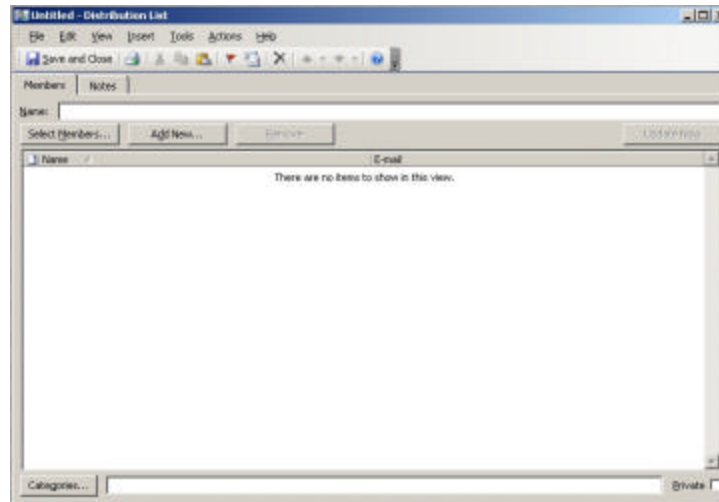
- a. With Outlook open, click on the Contacts button below the Calendar button. Be sure the contact you are adding does not already exist.
- b. On the Outlook toolbar, click on New and select Contact. The screen below will appear.



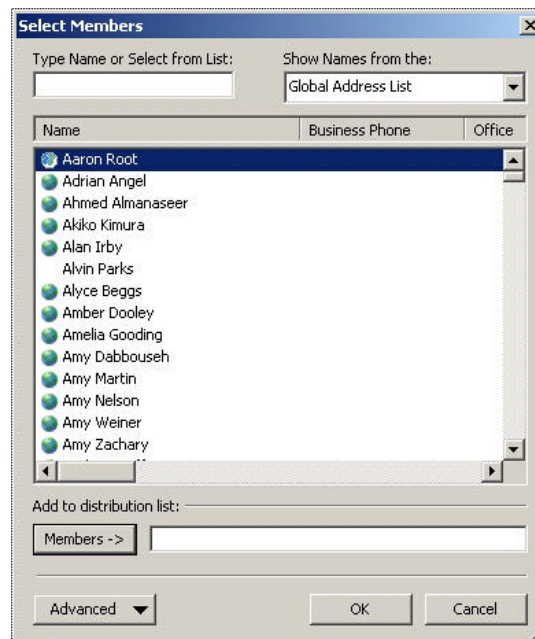
- c. Complete the necessary information. There are four additional tabs. These are not required fields.
- d. Click on the Save and Close button. This should return you to your contact list. The new contact is now visible and available in your Address book.


If there are groups of people that you frequently send emails to, you can create a Distribution or group list.

- a. With Outlook open, click on the Contacts button below the Calendar button. Be sure the group you are adding does not already exist.
- b. On the Outlook toolbar, click on New and select Distribution List located below Contact. The screen on the next page will appear.



- c. Complete the necessary information. There is an additional tab. This is not required.
- d. If the members you wish to include are already in your list of contacts, you can click on the Select Members button. The Select Members dialog box shown below will appear. Add the members to the distribution lists. Each member will be separated by a semicolon.



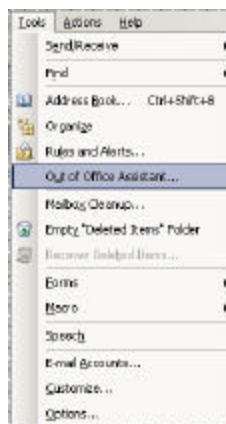
- e. If the members you wish to include are not in your list of contacts, you will need to enter each member separated by a semicolon.
- f. Click on the Save and Close button. This should return you to your contact list. The new distribution list is now visible and available in your Address book. The Distribution Lists have a group icon beside the name of the group. 

You can delete your personal contacts and distribution lists. Unless you are authorized, you can not delete shared distribution lists.

3. Out of the Office Assistant

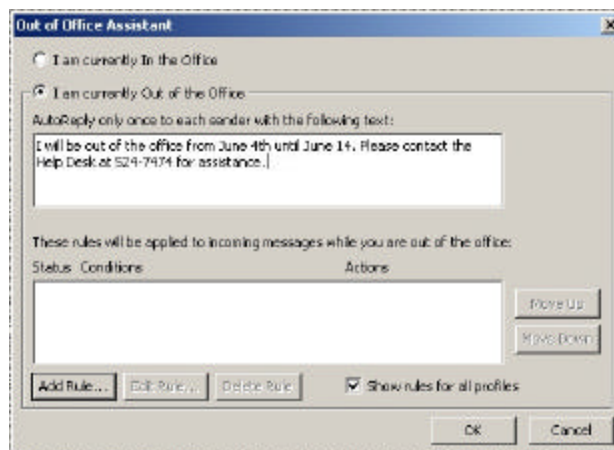
When you are going to be out of the office for an extended time, you can have a reply automatically sent to notify the sender you are unable to respond at this time.

From the menu bar, select Tools, Out of Office Assistant.



The dialog box on the next page will appear. Click on the “I am out of the office” option. Complete the message you want to send when you receive email while you are gone. You can also setup rules. The edit rules allow you to have a different message for a specific contact. The Edit Rules dialog box is also displayed on the next page.

On the Edit Rules dialog box, there are advanced settings available. An example of the Advanced options is on the next page.



Edit Rule

When a message arrives that meets the following conditions:

From...

Sent To...

☐ Sent directly to me ☐ Copied (Cc) to me

Subject:

Message body:

Perform these actions: ☐ Do not process subsequent rules

☐ Alert with

☒ Delete

☐ Move to

☐ Copy to

☐ Forward

Method:

☐ Reply with

☐ Custom

OK Cancel Advanced... Check Names

Advanced

Size (kilobytes)

At least:

At most:

Received

☒ From:

☒ To:

☐ Only unread items ☐ Importance

☐ Only items with attachments ☐ Sensitivity

☐ Only items that do not match these conditions

Show properties of

☒ Selected forms:

☐ Document

☐ Folder:

Properties:

OK Cancel

Click on OK until you are back to your inbox.

If you do not specify the Received From: and To: dates, the Out of the Office will occur immediately.